

# CASF QUICK REFERENCE GUIDE – GETTING STARTED WITH CASF

---

Welcome to the California Advanced Services Fund (CASF) application! The CASF application is available on the CPUC's eFAST application platform for organizations who wish to apply for grants in order to provide advanced broadband service to areas in the state of California.

This guide is designed to provide you with the basics in navigating the CASF screens and submitting your CASF application. This guide does not provide in-depth instructions on all of the fields and documents required in your application; however, if you require assistance in completing your CASF application you may contact the CASF team at [CASF\\_Application\\_Questions@cpuc.ca.gov](mailto:CASF_Application_Questions@cpuc.ca.gov).

**Important Note:** In order to use the CASF application you must first register for an eFAST account and have successfully solicited a company to provide you access to CASF. There are two access level roles for CASF – View and Update.

Use the links below to navigate quickly through this guide.

1. [CASF Application Home Page](#)
2. [Creating a CASF Project Application](#)
3. [CASF Project Application](#)
  - 3.1. [Project Data tab](#)
  - 3.2. [Project Files tab](#)
  - 3.3. [Contacts tab](#)
  - 3.4. [Finalize tab](#)
  - 3.5. [Notes tab](#)

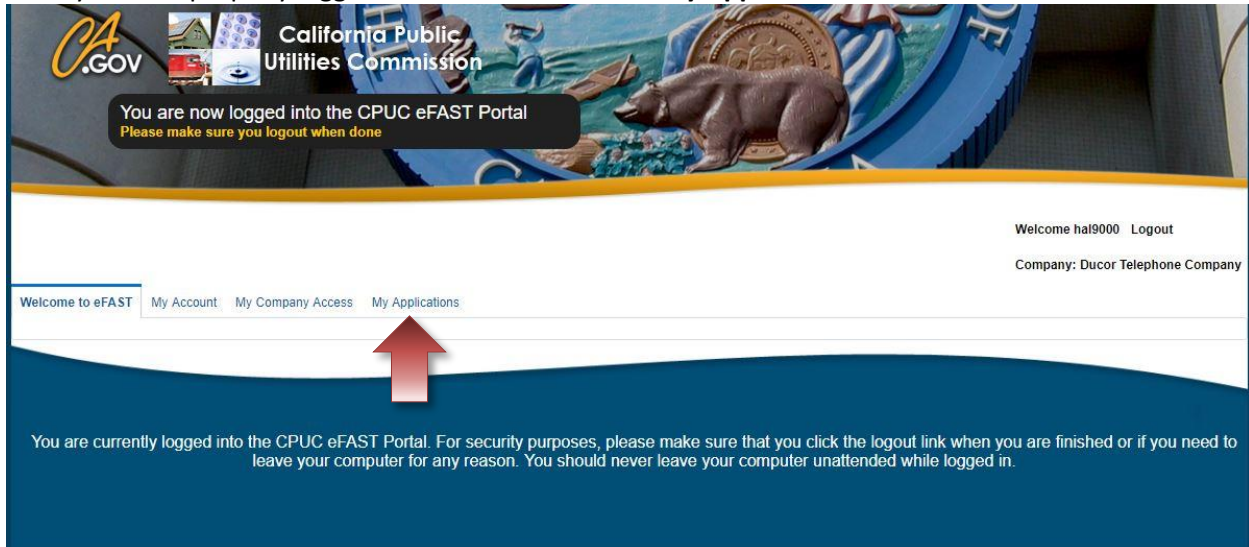
All sections in this document are for the Update role. The View role only allows for a user to read and view the data that has been entered by either someone in the Update role or by the CPUC. Access to the CASF application as well as assigning roles is completed through the Company Administrator for eFAST & CASF.

## Document Version control

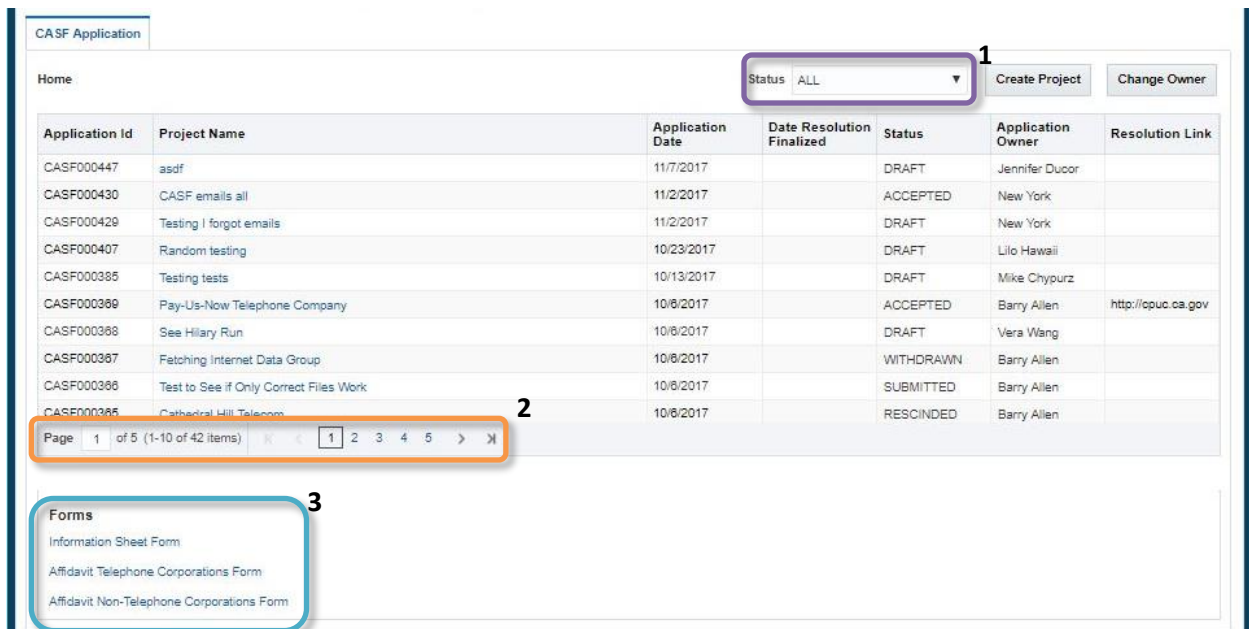
Version Number	Date	Description of changes	Author
1.0 – 1.2	2/21/2018	Initial document and edits and changes	Kimberly Siason

# 1 CASF Application Home Page

Once you have properly logged into eFAST click on the **My Applications** tab.



Under the CASF Application tab is the Home for CASF. Here you may see other projects created by users of the same company you are creating and editing application(s) for. You can filter CASF project applications by their status by clicking on the **Status dropdown**<sup>1</sup>. **Page navigation**<sup>2</sup> is located at the bottom of the CASF Project Application grid. **CASF forms**<sup>3</sup> are located at the bottom of the page.



[\[top\]](#)

## 2 Creating a CASF Project Application

In order to create a new CASF application, click on the **Create Project** button on the CASF Application Home Page. Users with View access will not be able to create a project.

CA.GOV California Public Utilities Commission

You are now logged into the CPUC eFAST Portal  
Please make sure you logout when done

Welcome hal9000 Logout  
Company: Ducor Telephone Company

Welcome to eFAST My Account My Company Access **My Applications**

CASF Application

Home Status: ALL [Create Project](#) [Change Owner](#)

Application Id	Project Name	Application Date	Date Resolution Finalized	Status	App Owner	Resolution Link
CASF000447	asdf	11/7/2017		DRAFT	Jenn...cor	
CASF000430	CASF emails all	11/2/2017		ACCEPTED	New York	
CASF000429	Testing I forgot emails	11/2/2017		DRAFT	New York	
CASF000407	Random testing	10/23/2017		DRAFT	Lilo Hawaii	
CASF000385	Testing tests	10/13/2017		DRAFT	Mike Chypurz	
CASF000369	Pay-Us-Now Telephone Company	10/6/2017		ACCEPTED	Barry Allen	http://cpuc.ca.gov
CASF000368	See Hilary Run	10/6/2017		DRAFT	Vera Wang	
CASF000367	Fetching Internet Data Group	10/6/2017		WITHDRAWN	Barry Allen	
CASF000366	Test to See if Only Correct Files Work	10/6/2017		SUBMITTED	Barry Allen	
CASF000365	Cathedral Hill Telecom	10/6/2017		RESCINDED	Barry Allen	

Page 1 of 5 (1-10 of 42 items) 1 2 3 4 5 > X

**Forms**

- [Information Sheet Form](#)
- [Affidavit Telephone Corporations Form](#)
- [Affidavit Non-Telephone Corporations Form](#)

You are currently logged into the CPUC eFAST Portal. For security purposes, please make sure that you click the logout link when you are finished or if you need to leave your computer for any reason. You should never leave your computer unattended while logged in.

Create New Application

Project Data Initial

\* Project Name

Input field: Project Name

\* Project Summary

Text area: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Integer enim neque volutpat ac. Faucibus pulvinar elementum integer enim neque volutpat ac tincidunt. Vitae tortor condimentum lacinia quis. Semper eget dui at tellus at. In fermentum et sollicitudin ac orci phasellus egestas. Semper eget dui at tellus at.

View

CPCN Number

Input field: 1125715

WIR Number

Input field: WIR Number

☐ Not a Telecommunications Carrier or Reseller

☒ Proof of CPCN

\* CEQA Exempt

☒ Yes
 ☐ No

Primary Contact

\* First Name

Input field: Hal

\* Last Name

Input field: Jordan

\* Title

Input field: VP of Broadband

\* Phone

Input field: 559-584-2215

Alternate Phone

Input field: Alternate Phone

\* Email

Input field: jla-glantern@yahoo.com

Alternate Email

Input field: Alternate Email

Fax

Input field: Fax

\* Address Line 1

Input field: 23473 Ave 56

Address Line 2

Input field: Address Line 2

\* City

Input field: Ducor

\* State

Input field: CA

\* Zip Code

Input field: 93218

\* Indicates a Required Field

Save

Cancel

Project Summary

>Lorem ipsum dolor sit amet consectetur adipiscing elit arcu hac, lobortis cursus eros cubilia habitasse ad condimentum ante, vestibulum neque himenaeos conubia torquent fames orci pulvinar. Condimentum proin fermentum enim facilisi nibh ultrices, aenean dignissim cras gravida elementum feugiat, maecenas tincidunt tempor pulvinar cum euismod, litora habitant sapien pharetra arcu. Massa hendrerit blandit est lectus metus ultricies pulvinar montes tristique et curabitur inceptos, maecenas integer habitasse purus magnis himenaeos pellentesque ligula dis potenti ultrices.

Imperdiet lobortis auctor posuere fames natoque himenaeos curae egestas sociis luctus, platea fermentum nullam sapien hac parturient dictumst netus senectus, habitasse condimentum vivamus quam nisi primis quis dictum tempus. Cursus vel dignissim platea eget posuere aliquet, ut ridiculus fames eleifend ullamcorper, convallis conubia tincidunt lectus malesuada. Cursus risus phasellus et ultrices per nullam donec aenean vel sagittis, mattis habitant class condimentum sapien a suscipit cum ullamcorper nec nascetur, ac posuere nostra aliquet vivamus vulputate erat at sociosqu.

OK

• • •  
4

### 3 CASF Project Application

Click the **Project Name** for the CASF project application that you wish to work on.

CA.GOV California Public Utilities Commission

You are now logged into the CPUC eFAST Portal  
Please make sure you logout when done

Welcome hall9000 Logout  
Company: Ducor Telephone Company

Welcome to eFAST My Account My Company Access **My Applications**

CASF Application

Home Status: ALL Create Project Change Owner

Application Id	Project Name	Application Date	Date Resolution Finalized	Status	Application Owner	Resolution Link
CASF000447	asdf	11/7/2017		DRAFT	Jennifer Ducor	
CASF000430	asdf emails all	11/2/2017		ACCEPTED	New York	
CASF000429	asdf forgot emails	11/2/2017		DRAFT	New York	
CASF000407	asdf testing	10/23/2017		DRAFT	Lilo Hawaii	
CASF000385	Testing tests	10/13/2017		DRAFT	Mike Chypurz	
CASF000389	Pay-Us-Now Telephone Company	10/6/2017		ACCEPTED	Barry Allen	http://cpuc.ca.gov
CASF000388	See Hilary Run	10/6/2017		DRAFT	Vera Wang	
CASF000367	Fetching Internet Data Group	10/6/2017		WITHDRAWN	Barry Allen	
CASF000366	Test to See if Only Correct Files Work	10/6/2017		SUBMITTED	Barry Allen	
CASF000365	Cathedral Hill Telecom	10/6/2017		RESCINDED	Barry Allen	

Page 1 of 5 (1-10 of 42 items) < 1 2 3 4 5 >

**Forms**  
Information Sheet Form  
Affidavit Telephone Corporations Form  
Affidavit Non-Telephone Corporations Form

You are currently logged into the CPUC eFAST Portal. For security purposes, please make sure that you click the logout link when you are finished or if you need to leave your computer for any reason. You should never leave your computer unattended while logged in.

This will open to the **Project Data** tab. The Project Name and Application Status display on the top of the page. To return to the CASF home page click on the **Back** button.

CASF Application

Application Management

Project Name Enim nulla aliquet porttitor lacus Application Status DRAFT Back

[top]



### 3.1 Project Data tab

The Project Data tab is used to make your CASF Application entries. Any supporting documentation for your application will be uploaded in the Project Files tab.

Project Data

Project Data

**1** Validate **2** Save

\* Project Name: Enim nulla aliquet porttitor lacus

☐ Not a Telecommunications Carrier or Reseller

\* Project Summary: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Integer enim neque volutpat ac. Faucibus pulvinar elementum integer enim neque volutpat ac tincidunt. Vitae tortor condimentum lacinia quis. Semper

**3** View

\* CEQA Exempt: ☒ Yes ☐ No

\* Organization Type: Not Specified

\* Fund Type: Not Specified

CPCN Number: 1125715

WIR Number:

**Money Requested**

Grant Requested: Contribution in Aid of Construction:

Loan Requested: Applicant Match:

Project Funds Requested (Grant or Loan): Total Project Budget:

**Location**

**4** Add **5** Remove

County Name	Active	Created By	Removed By	Removed Date	Removed Comment
Plumas	Yes	New York			
Sonoma	Yes	New York			
Stanislaus	Yes	New York			

**2** Save **6** Back to Top

When updating information on this screen, clicking on the following buttons will perform the indicated action:

**Validate<sub>1</sub>** – Validates that required fields are filled in. A listing of required fields that were left blank will be displayed. Closing the listing will allow you to make entries in the fields. For number fields requiring an entry, zero (0) is a valid entry.

**Save<sub>2</sub>** – Saves the current entries on the screen.

**View<sub>3</sub>** – Opens a window which will provide more space for entry. Clicking the **OK** button on this window will close it.

**Add<sub>4</sub>** – Opens a window where you can select counties for your CASF Project Application.

**Remove<sub>5</sub>** – Removes the highlighted County from the list of counties listed. A comment explaining the reason why the county is being removed must be entered. Note: Once a county has been removed, it may not be added back again.

**Back to Top<sub>6</sub>** – Navigates you to the top of the page.

## 3.2 Project Files tab

The Project Files tab is where you will attach the files that complete your CASF project application. Click on the name of file that needs to be attached to start the file upload process. In the below example it is for Organizational Chart. The document type for the requested file is displayed next to the Previous Versions button; for Organizational Chart the document type is PDF.

The screenshot displays the CPUC eFAST Portal interface. At the top, there is a banner for the California Public Utilities Commission with the text "You are now logged into the CPUC eFAST Portal Please make sure you logout when done". Below the banner, the user is logged in as "hal9000" and the company is "Ducor Telephone Company". The navigation bar includes "Welcome to eFAST", "My Account", "My Company Access", and "My Applications". The "My Applications" tab is selected, showing a "CASF Application" with the status "DRAFT". The "Project Files" tab is active, displaying a list of files to be uploaded. A red arrow points to the "001 Organizational Chart" file. The list includes:

File ID	File Name	Document Type	Previous Versions	View Uploaded File
001	Organizational Chart	PDF	Previous Versions	View Uploaded File
002	Information Sheet	PDF	Previous Versions	View Uploaded File
003	Company History	PDF	Previous Versions	View Uploaded File
004	Resume(s)	DOCX	Previous Versions	View Uploaded File
005	Current Infrastructure Description	DOCX	Previous Versions	View Uploaded File
006	Current Infrastructure Shape Files	ZIP	Previous Versions	View Uploaded File


After clicking on the name of the file to be uploaded, a file upload window will be displayed. In the file upload window you will need to check that the **File is valid for data requirements based on information requested<sub>1</sub>** and select the file by clicking the **Browse<sub>2</sub>** button and then by navigating to the file you wish to upload on your PC. You may enter comments in **Comments<sub>3</sub>** field if necessary. Clicking the **Upload** button will upload the selected file.

**Organizational Chart**

☐ File is valid for data requirements based on information requested **1**

Select File  **Browse...** **2**

Comments **3**

 **Upload** **Cancel**

You will be returned to the Project Files tab. A **checkmark**<sub>1</sub> will appear next to the requested file type number (e.g. 001) and a **status**<sub>2</sub> will show next to the file type (e.g. SUBMITTED). If you wish to view a file which has been uploaded already, click on the View Uploaded File button.

Application Management Project Name **Enim nulla aliquet porttitor lacus** Application Status **DRAFT** **Back**

Project Data **Project Files** Contacts Finalize Notes

Project Files

File Type	Status	Actions
<b>001</b> Organizational Chart The Organizational Chart for the company including all executive level staff	PDF <b>SUBMITTED</b>	<b>Previous Versions</b> <b>View Uploaded File</b>
<b>002</b> Information Sheet Information Sheet with a Certificate of Good Standing issued by the CA Secretary of State	PDF	<b>Previous Versions</b> <b>View Uploaded File</b>
<b>003</b> Company History Submit a description of your company and readiness to construct, manage and operate broadband services	PDF	<b>Previous Versions</b> <b>View Uploaded File</b>
<b>004</b> Resume(s) Submit one file containing up to 5 resumes of each key company officers and management personnel	DOCX	<b>Previous Versions</b> <b>View Uploaded File</b>
<b>005</b> Current Infrastructure Description Description of the provider's current broadband infrastructure and/or telephone service within 5 miles of the proposed project	DOCX	<b>Previous Versions</b> <b>View Uploaded File</b>

**Clicking on the following buttons will perform the indicated action:**

**Refresh**<sub>3</sub> – Refreshes the values on the screen (e.g. a Status might change from PROCESSING to SUBMITTED)

**Validate**<sub>4</sub> – Validates that required files are uploaded. A listing of required files will display. Closing the listing will allow you to upload files.

**Previous Versions**<sub>5</sub> – Opens a window which will show any older files which have been submitted. Initial uploads on a newly created project will not have any files. This will show only if a file has to be resubmitted and will have listed any older files which have been replaced.

**View Uploaded File**<sub>6</sub> – Opens a window which will include the file information for the file which was uploaded (SUBMITTED).

[\[top\]](#)



### 3.3 Contacts tab

The Contacts tab is where you will enter information for those in your company who can be contacted by the CPUC in regards to the CASF project application. An initial contact is created for the person who created the application (see the Creating a CASF Application section of this document). Clicking **Edit**<sub>1</sub> will open the Contact Details for that contact. Click **Add**<sub>2</sub> to add additional contacts on a blank Contact Details window.

CA.GOV California Public Utilities Commission

You are now logged into the CPUC eFAST Portal  
Please make sure you logout when done

Welcome hal9000 Logout  
Company: Ducor Telephone Comp

Welcome to eFAST My Account My Company Access My Applications

CASF Application

Application Management Project Name Enim nulla aliquet porttitor lacus Application Status DRAFT Back

Project Data Project Files Contacts Finalize Notes

Contact Management

Contacts List

Contact Type	First Name	Last Name	Address Line 1	Address Line 2	City	State	Zip Code	Title	Phone
Primary	Hal	Jordan	23473 Ave 56		Ducor	CA	93218	VP of Broadband	559-584-2215

Enter Contact Details ensuring that required fields have entries and click the **Save** button to create a new contact on the Contacts List.

Contact Details

\* Contact Type Secondary

\* First Name Sally

\* Last Name McRey

\* Address Line 1 424 Salvio St

Address Line 2 Ste 335

\* City Concord

\* State Code CA

\* Zip Code 95673

\* Title VP Sales

\* Email smcrey@yahoo.com

Alternate Email

\* Phone 925-555-1212

Alternate Phone

Fax

\* Indicates a Required Field

Save Cancel

[\[top\]](#)

### 3.4 Finalize tab

The Finalize tab is where you go to review your CASF Application as well as Submit your application. Clicking on the **Review** button will create a PDF which will show all the entries which were made for your CASF project application.

Clicking the **Submit** button will perform a validation on the Project Data tab entries and submitted Project Files. If the application does not pass the validation it is advised that you go to the tabs and run the tab's validation. Once both tabs validate you will be able to submit. Once the application passes the validation the Application Status will change to SUBMITTED.

The screenshot displays the CPUC eFAST Portal interface. At the top, the CA.GOV logo and the California Public Utilities Commission name are visible. A notification banner states: "You are now logged into the CPUC eFAST Portal. Please make sure you logout when done". The user is logged in as "hal9000" with a "Logout" link. The company name "Ducor Telephone Company" is also shown. The navigation bar includes links for "Welcome to eFAST", "My Account", "My Company Access", and "My Applications". The "My Applications" section shows a "CASF Application" with a "Project Name" of "Enim nulla aliquet porttitor lacus" and an "Application Status" of "DRAFT". A "Back" button is present. The "Finalize" tab is selected, showing a "Review" button (highlighted with a green box) and a "Submit" button (highlighted with a red arrow). The "Review" button is described as: "Review your application data you wish to submit or have already submitted in your CASF application by clicking on the Review button. This will generate a PDF file you can save or print for your records." The "Submit" button is described as: "By clicking Submit your application will be reviewed for completeness prior to sending along to the CPUC. If there are any items missing you will receive a warning message to that affect. If you do have missing project data or project files, please use the validate buttons on each of these tabs to resolve the issues prior to clicking on Submit again. Once your application is deemed complete, the CPUC will be notified about this application submission." A footer message states: "You are currently logged into the CPUC eFAST Portal. For security purposes, please make sure that you click the logout link when you are finished or if you need to leave your computer for any reason. You should never leave your computer unattended while logged in."

[\[top\]](#)

### 3.4.1 Notifications

The CASF application will send email notifications in regards to your application.

From the moment a CASF project application is created, you have 60 days to submit it. You will receive a total of three emails (see below for an example) reminding you that your application needs to be completed.

#### **Please complete your application**

Hello Hal Jordan

This is your 1st reminder that your CASF application is incomplete and needs to be completed within 60 days of creation.

Please login into the eFAST portal to access your CASF application.

If you have any questions, contact us at [CASF\\_Application\\_Questions@cpuc.ca.gov](mailto:CASF_Application_Questions@cpuc.ca.gov)

Thank you,



Below is an example of the email that will be sent to confirm that your application has been submitted.

#### **Your CASF application has been submitted**

Hello Jones Johns

Your CASF application has been submitted and CASF staff may contact you for further information.

If you have any questions, contact us at  
[CASF\\_Application\\_Questions@cpuc.ca.gov](mailto:CASF_Application_Questions@cpuc.ca.gov).

Thank you



Below is another example of a change to the status of your CASF project application. In the instance below it shows when the application has been accepted by CASF staff.

### **A CASF Application Has Been Accepted**

Hello Barry Allen

A CASF application has been accepted by CASF staff and is under review.

If you have any questions, contact us at  
[CASF\\_Application\\_Questions@cpuc.ca.gov](mailto:CASF_Application_Questions@cpuc.ca.gov)

Thank you,



[\[top\]](#)

### 3.5 Notes tab

The Notes tab is used by both you and the CPUC CASF team. This will display the notes which have been made regarding the CASF project application. To create a new note, click the **Add** button.

The screenshot displays the CPUC eFAST Portal interface. At the top, the header includes the CA.GOV logo, the California Public Utilities Commission logo, and a message: "You are now logged into the CPUC eFAST Portal. Please make sure you logout when done". Below the header, the user is logged in as "hal9000" and the company is "Ducor Telephone Company". The main navigation bar shows "Welcome to eFAST", "My Account", "My Company Access", and "My Applications". The "My Applications" tab is selected, showing a "CASF Application" sub-tab. The "Application Management" section displays the "Project Name" as "Enim nulla aliquet porttitor lacus" and the "Application Status" as "DRAFT". The "Notes" tab is selected, showing a "Notes History" table with columns: Note Type, Note Date, Note, Created By, Internal Staff Only, Confidential, and Application Status. The table is currently empty, displaying "No data to display.". An "Add" button is located to the right of the table. Below the table, there is a "Notes" section with a "View" button. At the bottom of the page, a security notice states: "You are currently logged into the CPUC eFAST Portal. For security purposes, please make sure that you click the logout link when you are finished or if you need to leave your computer for any reason. You should never leave your computer unattended while logged in."

CA.GOV California Public Utilities Commission

You are now logged into the CPUC eFAST Portal  
Please make sure you logout when done

Welcome hal9000 Logout  
Company: Ducor Telephone Company

Welcome to eFAST My Account My Company Access My Applications

CASF Application

Application Management Project Name Enim nulla aliquet porttitor lacus Application Status DRAFT Back

Project Data Project Files Contacts Finalize Notes

Notes History Add

Note Type	Note Date	Note	Created By	Internal Staff Only	Confidential	Application Status
No data to display.						

Notes

Note Type	Internal Staff Only	Application Status
Note Date	Confidential	Created By
* Note		

View

You are currently logged into the CPUC eFAST Portal. For security purposes, please make sure that you click the logout link when you are finished or if you need to leave your computer for any reason. You should never leave your computer unattended while logged in.



To create a new CASF application note:

1. Use the dropdown to select the **Note Type**<sub>1</sub>.
2. Select the **Confidential**<sub>2</sub> status for the note.
3. Enter your note in the **Note**<sub>3</sub> field.
4. Click the **Save** button

The screenshot shows a web form titled "Create Application Note". At the top, there is a "Note Type" dropdown menu with "INITIAL REVIEW" selected, highlighted by a blue box and labeled with a "1". To its right is a "Confidential" status section with radio buttons for "Yes" and "No", where "No" is selected, highlighted by a green box and labeled with a "2". Below these is a large text area labeled "\* Note" with a purple border, labeled with a "3". To the left of the text area, the "Application Status" is set to "SUBMITTED". At the bottom right are "Save" and "Cancel" buttons, with a red arrow pointing to the "Save" button. A legend at the bottom left states "\* Indicates a Required Field".

[\[top\]](#)